

# FileMaker

# Client User Manual



McLean County Unit District No. 5

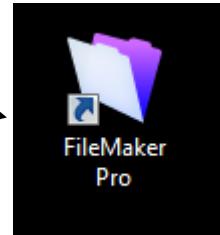
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# FILEMAKER CLIENT USER ACCESS

## How to get to FileMaker Client -

Double click the FileMaker Client Shortcut on your computer desktop.  
If you don't have FileMaker Client installed, follow the instructions located  
in the document in your Special Education Flash Drive titled  
"Instructions to Install and Setup FileMaker Client 14". The  
installation must be done at your school and can't be done outside of  
the district.



PDF copies of FileMaker manuals and installation  
instructions are available on the Unit 5 website and  
in your Special Education flash drive.

Navigate to [www.unit5.org](http://www.unit5.org), click on the Staff  
Menu and click on Special Education. Now click on  
FileMaker access.

NOTE-Web users also access the web version of  
FileMaker at this site but if you are a client user  
DO NOT use the web version of FileMaker.

## SPECIAL EDUCATION

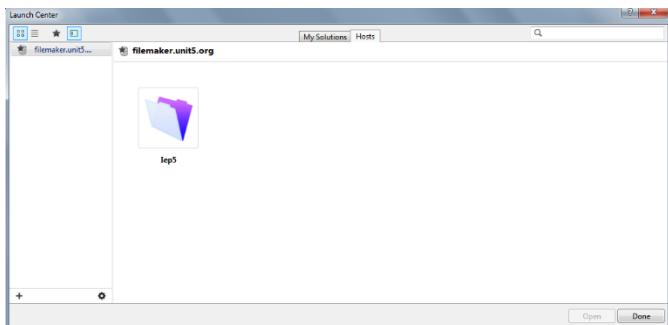
- ▶ Home
- ▶ FileMaker Access
- ▶ Assistive Technology Software
- ▶ Tips for using iPad and iPod
- ▶ Secondary Transition
- ▶ Special Education Forms
- ▶ Speech and Language
- ▶ Training

ABOUT US   BOARD OF EDUCATION   STUDENTS & PARENTS   EMPLOYMENT   DEPARTMENTS   STAFF

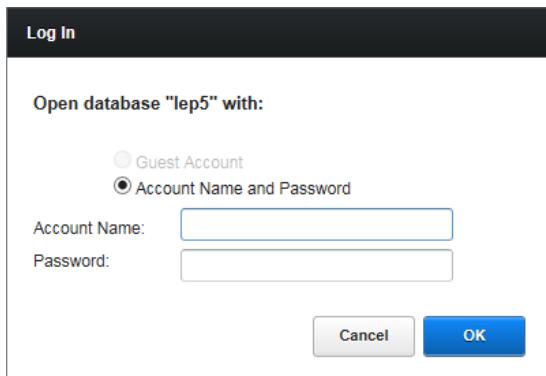
**SPECIAL EDUCATION**

- ▶ Home
- ▶ **FileMaker Access**
- ▶ Software Tools
- ▶ Tips for using iPad and iPod
- ▶ Special Education Forms
- ▶ Speech and Language
- ▶ Training

- **FileMaker Web User Links**
  - FileMaker Web Access
  - FileMaker Web User Manual
- **FileMaker Client User Links**
  - FileMaker Client User Manual
  - Instructions to Install and Setup FileMaker Client



Double click on lep5 or single click and then  
Click on Done



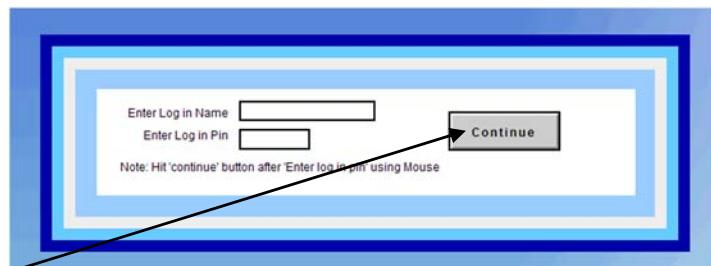
Type in the above Account Name and Password, click OK. This information is **case sensitive**. The “Caps Lock” on the keyboard should be off. Type them exactly as shown above. (Mac Users: DO NOT check the “Add to Keychain” box. PC Users: DO NOT save password).

**Enter Log in Name:** Your Username

**Press the Tab Key** to move to the Log in Pin box

**Enter Log in Pin:** Your FileMaker password, the password will not show as you type. You can double click in the box to verify the password after you finish entering it.

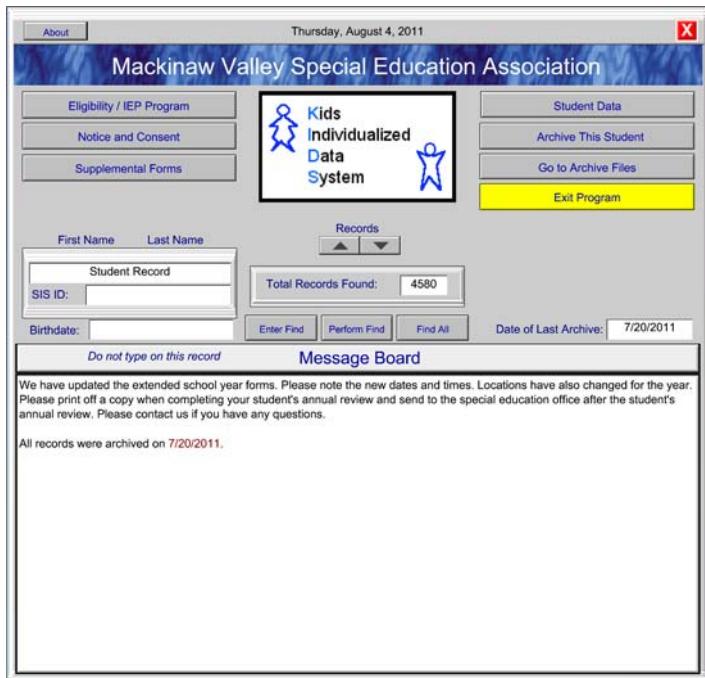
**Click Continue** with the mouse,  
do not use the Enter key.



**Note:** If you are having a problem logging in, contact Nora Bardi ~ [bardini@unit5.or](mailto:bardini@unit5.or)

# MAIN MENU

After completing the Log in process, the program opens to the Main Menu screen.



Click any button to access an area of the database after finding the appropriate student record.

\***Always exit the program properly** by using the “Exit Program” button on the Main Menu. If this button is not used to exit the database information **MAY NOT BE SAVED**.

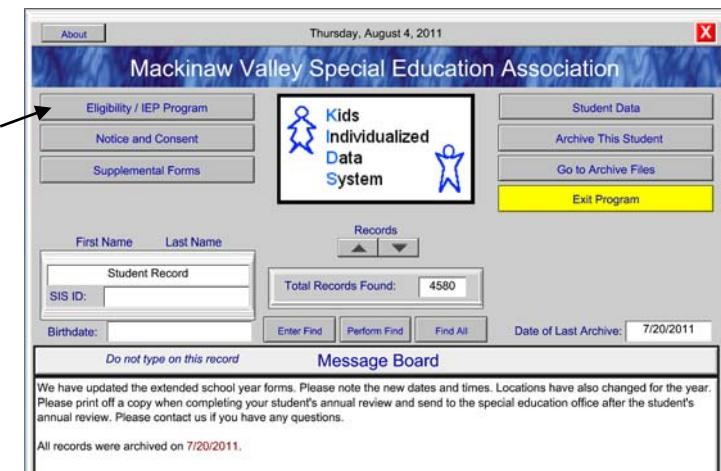
The Message Board is used to post messages or reminders to staff members. Be sure to check it for any messages.

## Finding a Student

- Single click the Enter Find button. The fields on the screen will blank out and the cursor will flash in the field that contains the First and Last Name of the student.
- Type the student name in the First and Last Name field and then single click the Perform Find button.
- If a response of “Student Not Found” comes on the screen, contact Lori Strickler at Field Special Services Center or by email strickla@unit5.org. The record has not been entered or the spelling may be incorrect.
- If you are having problems locating a student it may because of a misspelling. Try entering just the last name or first and last initial such as A C. Be sure to have a space between the initials. However, using this approach can lead to locating more than one record. To find the record you want just click the up and down Records arrows until you locate the correct record. Once you locate the correct name, click Enter Find, type the whole name and click Perform Find. This will result in the Total Records Found equaling 1. **To avoid inadvertently placing data on another student's record, only enter the database with Total Records Found equaling 1.**

# IEP MENU

- Once a student has been located on the Main Menu and Total Records Found equals 1, simply click on the Eligibility/IEP Program button to access the IEP data for that student.



- Access to individual IEP pages can be obtained by clicking on any of the page titles.
- To access a specific goal, click on the goal number on the menu.
- The checkboxes aligned with each page title are called Data Boxes. If there is data entered on any page, an "X" will appear in the box.

- From the selected page, in this case the IEP Conference Summary Report, click on the Menu button to return to the Eligibility/IEP Menu.

# IEP INPUT

- Checkboxes are point and click, but appear as checkmarks on your input screen.
- After navigating to an IEP input screen it does not appear that there are any drop down arrows to allow for data choices, but simply clicking in any field on the page will make the arrows appear.

- Now the arrows are visible at the right end of the field.
- When using drop down lists, you must make a choice from the list. To remove a previous choice, choose the “Blank” at the end of the drop down list. Slide the scroll bar if needed. To type text other than the choices on the list, choose “other” and type the text in the field adjacent to the drop down list. If the word “other” is not listed, then a choice must be made from the list and typing your own text is not available.

## Notes:

~Use the **Back and Forward** buttons to navigate to the next or previous screen.

~If a screen includes a Save button (generally located on screens where long narratives are written, such as the Present Levels of Academic Achievement page), you can click it to save any data that has been entered without navigating to another page and then returning to save the data on the screen.

~Navigate to the IEP menu screen from any page by clicking on the Menu button.

~Spell check is a feature of FileMaker Client.

# SAVING

To save data entered on a screen, the user must move from one screen to another using the Back and Forward buttons or when available, click on a Save button. Save buttons are located on the top of screens where a significant amount of data is entered, such as the Present Levels page.

# PRINTING FROM PREVIEW

Student Name: Test Student 3 Individualized Education Program (Conference Summary Report)

Date of Birth:

STUDENT: Student 3 Test Current Grade: \_\_\_\_\_

Get from Conf. Notice Last (Legal) First Middle

Date of Meeting: 1/1/2010 Date of Most Recent 5/1/2014 Date of Next 5/1/2018

PURPOSE OF CONFERENCE (Check all that apply) Add three years to Date of Last Evaluation and enter:

Review of Existing Data  Reevaluation  IEP Review/Revision  Manifestation Determination  Termination of Placement  
 Initial Eligibility  Initial IEP  Transition  Graduation/Exit  Other (e.g. FBA/BP)

STUDENT IDENTIFICATION

Student's Address (Street, City, State, Zip Code) Student's Date of Birth SIS ID Number

Ethnicity Gender Anticipated Date of HS Graduation May 2014

Language Used by Student Mode of Communication Used by Student Case Manager

Placement (To Be Completed After Placement Determination) Disability(s) Web Users, click 'Submit' to see Disability Description. Submit NA Not Eligible for Special Education

Resident District McLean County Unit 5 Serving District

Resident School Serving School

- To produce a Preview of how the document will look when printed, select the Preview button on the right corner of the input screen.

UNIT 5 INDIVIDUALIZED EDUCATION PLAN (CONFERENCE SUMMARY REPORT)

STUDENT: Blank Record CURRENT GRADE: \_\_\_\_\_

Last (Legal) First Middle

DATE OF MEETING: DATE OF MOST RECENT EVALUATION: DATE OF NEXT REEVALUATION:

PURPOSE OF CONFERENCE (Check all that apply)

Review of Existing Data  Reevaluation  IEP Review/Revision  Manifestation Determination  Termination of Placement  
 Initial Eligibility  Initial IEP  Transition  Graduation/Exit  Other \_\_\_\_\_

STUDENT IDENTIFICATION INFORMATION

Student's Address (Street, City, State, Zip Code) Student's Date of Birth Gender SIS ID Case Manager

Ethnicity M

Disability(s) Resident District  
Resident School

Related Services Serving District  
Serving School

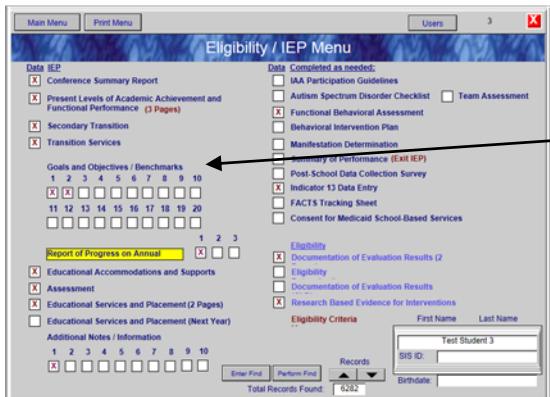
PARENT/GUARDIAN INFORMATION

(1) Parent's Name  Educational Surrogate Parent (2) Parent's Name  Educational Surrogate Parent

(1) Parent's Address (Street, City, State, Zip Code) (if different) (2) Parent's Address (Street, City, State, Zip Code) (if different)

- To return to the input screen from this preview screen, press the ENTER key.
- WARNING – NEVER** enter information on the preview screen, although it is possible to do so, the data is unreliable and can cause problems with the database.
- To print the previewed page simply click File and then click Print

# GOALS AND OBJECTIVES



- Access to the Goals and Objectives input screens can be gained through the IEP Menu or by forwarding through the IEP Input screens.
- The buttons 1-20 on the screen will allow access to any of the goals previously written for the student.
- Each goal contains space for three objectives. Consider keeping goals to three objectives, rather than having goals that continue onto another goal page.
- The Goal Bank is only available by remoting into the client version of FileMaker.

- Clicking on the Goals button will navigate to the Goals and Objectives Menu.

Student Name: \_\_\_\_\_ Date of Birth: \_\_\_\_\_ Goals and Objectives Goal Page 1 X

Complete for initial IEPs and annual reviews. (Anyone responsible for implementing the IEP (e.g., goals and objectives, accommodations, modifications and supports) must be notified of her/his specific responsibilities.)

CURRENT ACADEMIC ACHIEVEMENT AND FUNCTIONAL  
Include a brief statement of the academic or functional performance deficit that is to be addressed.

GOALS AND OBJECTIVES  
\*Do not select both Academic and Functional, choose only one. For students over 14 1/2 always check Transition along with Academic or Functional.

Goal Statement      Indicate Goal Area:  Academic  Functional  Transition

IL Learning Standard/Common Core #: \_\_\_\_\_  
Title(s) of Goal Implementer(s) \_\_\_\_\_ Delete Goal

Customized Technology, Inc.  
Goals and Objectives IEP X

► English - Language Arts ► English - Language Arts (CC)

► Speech, Language, Communication and Preverbal Language

► Social and Emotional

► Mathematics

► Science

► Social Science

► Fine Arts Home Customized Technology, Inc.  
Goals and Objectives IEP X

► Physical

► Deaf and Hard of Hearing

► Blind, Visually Impaired

► Orientation

► Transition

English - Language Arts

Illinois Learning Standards Goal 1: Read with understanding and fluency

Illinois Learning Standards Goal 2: Read and understand literature representative of various societies, eras and ideas.

Illinois Learning Standards Goal 3: Write to communicate for a variety of purposes

Illinois Learning Standards Goal 4: Listen and speak effectively in a variety of situations.

Illinois Learning Standards Goal 5: Use the language arts to acquire, assess and communicate information.

Alignment with Early Learner Standards

[www.customizediep.com](http://www.customizediep.com)

- Review the list and click on the blue arrows to see the Learning Standards.

Customized Technology, Inc.  
Goals and Objectives  
ENGLISH - LANGUAGE ARTS

Illinois Learning Standards Goal 1: Read with understanding and fluency

**1A Apply word analysis and vocabulary skills to comprehend selections.**

1A Demonstrate that pictures and symbols have meaning and print carries a message. 1A

look at a picture when it is named by an adult reading a book.

Identify personal spaces and possessions labeled with a picture or word.

Identify \_\_\_\_\_ logos and pictures and demonstrate their meaning.

tell a story by pointing to pictures.

tell a story by pointing to print on a page.

Click here to find out how to purchase a printed copy of this Goal Bank at [www.CustomizedIEP.com](http://www.CustomizedIEP.com)

- To select a goal, click on the first word of the goal (displayed in blue). The program will automatically return to the Goal and Objective input screen that you were just on.

- Use the Return button to move back a screen in the Goals and Objectives area.
- To return to the Goal Page without selecting a goal or objective, click on the IEP button.

GOALS AND OBJECTIVES

Goal Statement      Indicate Goal Area:  Academic  Functional  Transition:  
Will apply word analysis skills to identify and understand unfamiliar words. 1A

Goals      Paste

Illinois Learning Standard #  
Title(s) of Goal Implementer(s)

1 Delete Goal

- Click the Paste button on the input screen and the goal will be inserted.

Short-Term Objective for Measuring Progress on the Annual Goal				
1	Obj.	Paste		
Evaluation Criteria	Evaluation Procedures	Schedule for Determining Progress	Dates Reviewed	Extent of Progress

- Repeat the copy and paste function for the Objectives by using the "OBJ" button to navigate to the Goals and Objectives Menu. Objectives are in black text.

Transition:

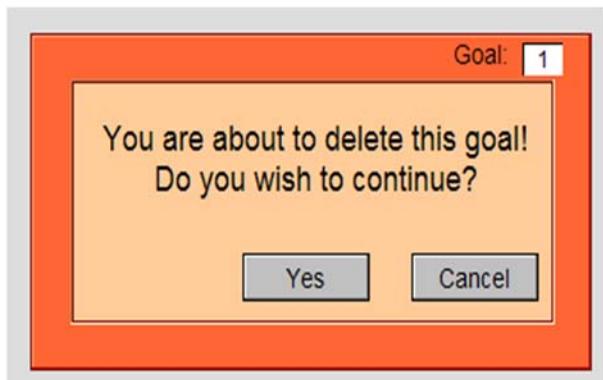
Goals  
Paste

1 Delete Goal

## Deleting Goals

- Below the Goals and Paste buttons is a button to Delete Goal.

- If YES is chosen from the Delete Goal Prompt, the information, including all objectives and data on that goal will be deleted. The remaining goals will then be moved up one goal page so that all goals are in order with no blank goals mixed in.
- When preparing for an annual review it is necessary to delete the information on the goals and objectives pages in order to develop the new IEP. Deleting the goal makes this process much faster.
- Make sure you have hard copies of the goal pages before you delete the goals.



# STATE STANDARDS

- Access to the State Standards is obtained on each of the goal pages by clicking the Standard Number to the left of the goal.
- Note that only the goal number links to the Standards, not the objectives.

Return      Customized Technology, Inc.      Goals and Objectives      IEP      X

ENGLISH - LANGUAGE ARTS

Illinois Learning Standards Goal 1: Read with understanding and fluency

**1A** Apply word analysis and vocabulary skills to comprehend selections.

Demonstrate that pictures and symbols have meaning and print carries a message. **1A**

look at a picture when it is named by an adult reading a book.

Identify personal spaces and possessions labeled with a picture or word.

Identify \_\_\_\_\_ logos and pictures and demonstrate their meaning.

tell a story by pointing to pictures.

tell a story by pointing to print on a page.

Click here to find out how to purchase a printed copy of this Goal Bank at [www.CustomizedIEP.com](http://www.CustomizedIEP.com).

FileMaker Pro - [Goals5 (Data Center)]

File Help

Goal **Read with understanding and fluency.**

Learning Standard **Apply word analysis and vocabulary skills to comprehend selections.**

No. **1A**

Early Elementary	Late Elementary	Middle/Jr. High School	Early HS	Late HS
1A1a. Apply word analysis skills (e.g., phonics, word patterns) to recognize new words.  1A1b. Comprehend unfamiliar words using context clues and prior knowledge; verify meanings with resource materials.	1A2a. Read and comprehend unfamiliar words using root words, synonyms, antonyms, word origins and derivations.  1A2b. Clarify word meaning using context clues and a variety of resources including glossaries, dictionaries, and thesauruses.	1A3a. Apply knowledge of word origins and derivations to comprehend words used in specific content areas (e.g., scientific, political, literary, mathematical).  1A3b. Analyze the meaning of words and phrases in their context.	1A4a. Expand knowledge of word origins and derivations and use idioms, analogies, metaphors and similes to extend vocabulary development.  1A4b. Compare the meaning of words and phrases and use analogies to explain the relationships among them.	1A5a. Identify and analyze new terminology applying knowledge of word origins and derivations in a variety of practical settings.  1A5b. Analyze the meaning of abstract concepts and the effects of particular word and phrase choices.

- This form can be printed to keep with your IEP or used as a reference.
- Print by using the Print (FileMaker) button
- To return to the Goal Bank Main Menu, use the Home button.
- To go back one screen, use the Return button.

# NOTICE AND CONSENT

Main Menu

Print All Checked Pages (Web) Print All Checked Pages (FileMaker)

**Forms Menu**

- 1 Notification of Decision Regarding Request for Evaluation
- 2 Consent for Initial Evaluation Pg 1
- 3 Consent for Reevaluation Pg 1
- \* 4 Consent for Eval.Pg 2 (Identification of Assessments) (2 pgs)
- 5 Notification of Conference (Domain Pages)
- 6 Notification of Conference Recommendations
- 7 Consent for Initial Provision of Special Ed. & Related Serv.
- 8 Notification of IEP Amendment (Minor IEP Changes)
- 9 Excusal of an IEP Team Member
- 10 Notification of Transfer of Rights Due to Age of Majority
- 11 Delegation of Right to Make Educational Decisions
- 12 Mutual Written Agreement to Extend Evaluation Timeline (For students with or suspected of having SLD only.) (New)
- 13 Consent for Agency Invitation to Transition Mtg. - Parent
- 14 Consent for Agency Invitation to Transition Mtg. - Student
- 15 Consent for Exchange of Confidential Information
- 16 Prior Written Notice Regarding Parent Revocation

**PDF Only**

Enter Find Perform Find Find All

Exit Program

Print English Print Spanish Data

\* Prior to printing this form from the Web, set your Page Setup options to Landscape.

PDF Preview - All users: Hold down Control Option if pop up blocker is enabled. FileMaker users will launch their web browser.

- Access the Notice and Consent forms Menu from the Main Menu.
- To print forms place a check in the appropriate forms box under “Print English” or “Print Spanish”.
- Click the Print all Checked Pages (FileMaker) button.

Student Name:		Parent/Guardian Consent for Initial Evaluation	
Date of Birth:		1/14/1992	
NAME OF CHILD		DATE OF BIRTH	DATE
		1/14/1992	
Parent Names/Address:		Parent 2 Names/Address: (if different):	
Bloomington IL 61704			
Each school district shall ensure that a full and individual evaluation is conducted for each child being considered for special education and related services. The purpose of an evaluation is to determine: <ul style="list-style-type: none"> <li>- Whether the child has one or more disabilities;</li> <li>- The present levels of academic achievement and functional performance of the child;</li> <li>- Whether the disability is adversely affecting the child's education; and,</li> <li>- Whether the child needs special education and related services.</li> </ul> An evaluation considers domains (areas related to the suspected disability) that may be relevant to the educational problems experienced by the individual child under consideration. The nature and intensity of the evaluation, including which domains will be addressed, will vary depending on the needs of your child and the type of existing information already available. The IEP Team, of which you are a member, determines the specific assessments needed to evaluate the individual needs of your child. Within 60 school days from the date of parent/guardian consent, a conference will be scheduled with you to discuss the findings and determine eligibility for special education and related services.			
The IEP team must complete page 2 of this form prior to obtaining parental consent for evaluation.			

# PRINT MENU

**Main Menu**   **IEP Menu**

**Eligibility / IEP Print Menu**

Print	Data
<input type="checkbox"/>	<input checked="" type="checkbox"/> Conference Summary Report
<input type="checkbox"/>	<input checked="" type="checkbox"/> Present Levels of Academic Achievement and Functional Perf.
<input type="checkbox"/>	<input checked="" type="checkbox"/> Secondary Transition
<input type="checkbox"/>	<input checked="" type="checkbox"/> Transition Services
<input type="checkbox"/>	<input checked="" type="checkbox"/> Goals and Objectives / Benchmarks
<input type="checkbox"/>	<input checked="" type="checkbox"/> Educational Accommodations and Supports
<input type="checkbox"/>	<input checked="" type="checkbox"/> Assessment
<input type="checkbox"/>	<input checked="" type="checkbox"/> Educational Services and Placement
<input type="checkbox"/>	<input type="checkbox"/> Educational Services and Placement(Next Year)
<input type="checkbox"/>	<input checked="" type="checkbox"/> Additional Notes / Information
<input type="checkbox"/>	<input type="checkbox"/> IAA Participation Guidelines
<input type="checkbox"/>	<input type="checkbox"/> Autism Spectrum Disorder Checklist
<input checked="" type="checkbox"/>	<input type="checkbox"/> Functional Behavioral Assessment
<input type="checkbox"/>	<input type="checkbox"/> Behavioral Intervention Plan
<input type="checkbox"/>	<input type="checkbox"/> Manifestation Determination
<input type="checkbox"/>	<input type="checkbox"/> Summary of Performance
<input type="checkbox"/>	<input type="checkbox"/> Post-School Data Collection Survey
<input checked="" type="checkbox"/>	<input type="checkbox"/> Indicator 13 Data Entry
<input type="checkbox"/>	<input type="checkbox"/> FACTS Tracking Sheet
<input type="checkbox"/>	<input type="checkbox"/> Consent for Medicaid Services
<input type="checkbox"/>	<input type="checkbox"/> Spanish

**Print**   **Data**

<input type="checkbox"/>	<input checked="" type="checkbox"/> Report of Progress on Annual Goals
<input type="checkbox"/>	<input checked="" type="checkbox"/> Documentation of Evaluation Results (2 Pages)
<input type="checkbox"/>	<input type="checkbox"/> Eligibility Determination
<input type="checkbox"/>	<input type="checkbox"/> Documentation of Evaluation Results (SLD)
<input type="checkbox"/>	<input checked="" type="checkbox"/> Research Based Evidence for Interventions (3 pages)

**Eligibility Criteria**

<input type="checkbox"/>	<input type="checkbox"/> Autism	<input type="checkbox"/>	<input type="checkbox"/> Orthopedic Impairment
<input type="checkbox"/>	<input type="checkbox"/> Deaf-Blindness	<input type="checkbox"/>	<input type="checkbox"/> Other Health Impair.
<input type="checkbox"/>	<input type="checkbox"/> Deafness	<input type="checkbox"/>	<input checked="" type="checkbox"/> Specific Learning Dis.
<input type="checkbox"/>	<input type="checkbox"/> Developmental Delay	<input type="checkbox"/>	<input checked="" type="checkbox"/> LD Eligibility Det.
<input type="checkbox"/>	<input type="checkbox"/> Emotional Disability	<input type="checkbox"/>	<input type="checkbox"/> Speech or Lang. Impair.
<input type="checkbox"/>	<input type="checkbox"/> Hearing Impairment	<input type="checkbox"/>	<input type="checkbox"/> Traumatic Brain Injury
<input type="checkbox"/>	<input type="checkbox"/> Intellectual Disability	<input type="checkbox"/>	<input type="checkbox"/> Visual Impairment
<input type="checkbox"/>	<input type="checkbox"/> Multiple Disabilities	<input type="button" value="Save PDF IEP Summary"/>	

Test Student 3  
SIS ID: \_\_\_\_\_  
Birthdate: \_\_\_\_\_

## Steps to print

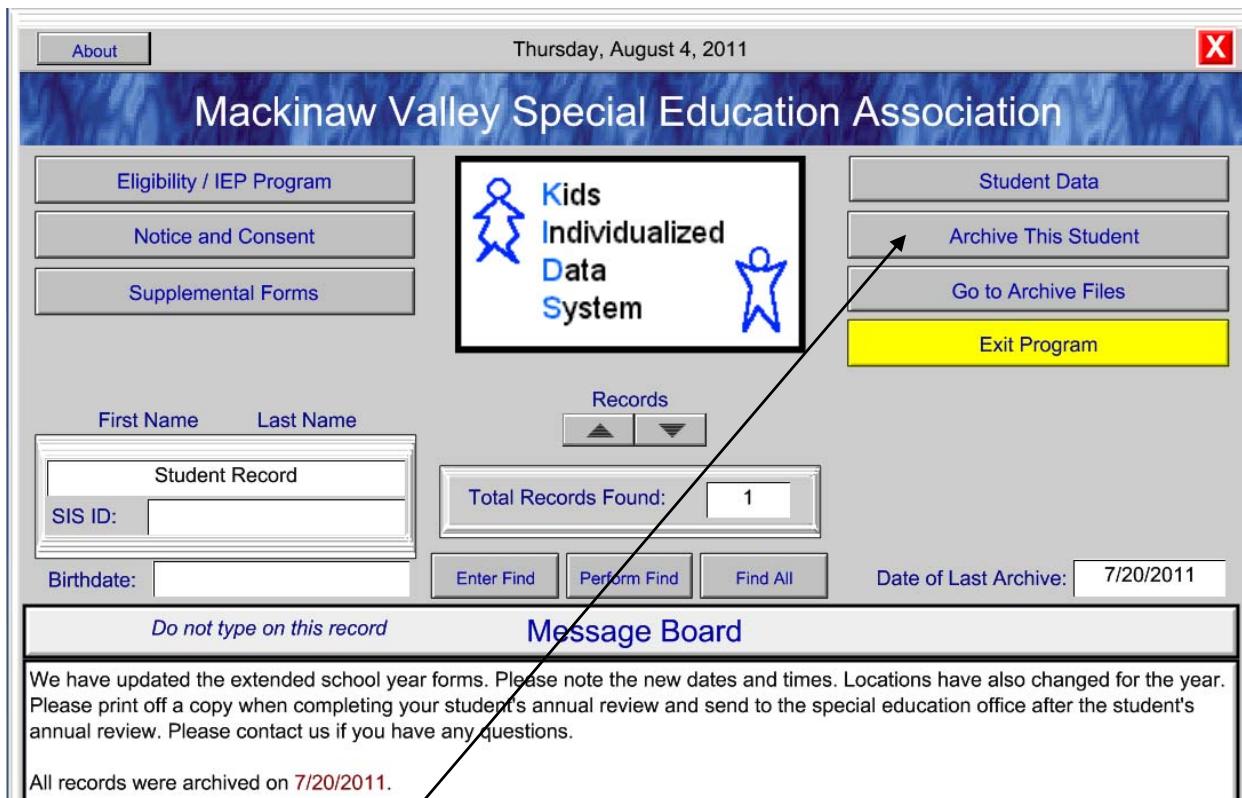
- Simply check the boxes next to the pages to be printed.
- Then click the Print All Checked Pages (FileMaker) button.
- You can also click on the title of a particular page to print that specific page

## Notes

~The “Mark With Data” button will automatically insert an “X” in the Print Boxes for the forms with an “X” already showing in the Data Box.

~The “Mark All” button will select every form regardless of whether there is data on the form or not.

# ARCHIVE



## Archiving Procedures:

- Archiving (backing up a student's IEP) is completed by Lori Strickler (the button is disabled to other users).
- You must request an archive following a completed annual review or following any meeting where data is changed on the student's record. This should only be done when the meeting has been finalized, all data has been entered and updated from all related service staff.
- You must request to have a student IEP archived when you make any changes to the current document. This must be done after an IEP meeting where you have made changes to the document in any way.
- Email the archive request to Lori at [strickla@unit5.org](mailto:strickla@unit5.org), send a hard copy of the entire IEP to the Special Services Center and place a copy in the student's cumulative folder in your building. This should be done after an annual review as well as any meeting where changes have been made to the IEP.

# How to Attach the Conference Notice to an Email

- If you have not already done so, install PDF Creator on your laptop
  - All Programs
  - Click the folder Microsoft System Center 2012 R2
  - Click Software Center
  - Click Find additional applications from the Application Catalog
  - Click in the Search box and enter PDF Creator
  - Click Install in the bottom right hand corner, scrolling may be needed to see this button
  - Click Yes, you will see a window informing you when the install is done
- In FileMaker open the Notice of Conference that you want to attach to an email.
- Select Preview in English or Spanish as needed.
- Select the File Menu and select Print.
- In the Select Printer window, scroll if needed, and double click on PDF Creator.
- In the PDF Creator window give the file a name that will help you identify the file later. A suggestion might be noticeab, where 'ab' are the initials of the student.  
Don't worry about entering any information in the remaining areas of this window.
- Click on Save.
- Select a location to save the file, such as your H:Drive or Google Drive.
- Click on Save.
- The PDF version of the Notice will open, you can just close it.
- Press the Enter key to exit preview mode in FileMaker.
- Now you can open Outlook and create a new email. Then simply attach the PDF file of the notice to the email.